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ABSTRACT

This curriculum guide has been designed to provide the teacher with a basis for planning a comprehensive program in the career field of universal teller, and to allow the teacher and learner maximum flexibility. The teaching or instruction, in both educational and financial institutions, can be accomplished through large formal groups, small groups, or individual instruction. The competency-based guide is intended to serve persons of diverse abilities, aptitudes, interests, and cultural backgrounds. The curriculum guide is a vocationally oriented system designed to meet the needs of persons who have entered or are preparing to enter finance and credit careers requiring competencies as a universal teller, including the following: mathematics, business English, machine skills, promotion of services, filing, and management. Each skill/task is developed into a goal format with a stated objective, resources identified, and an evaluation procedure to determine competence. Goals are not sequenced, and learning/instruction format can be varied to meet individual or group needs. The eight sections of the curriculum guide cover general skills, communications, human relations/customer relations, mathematics/drawer transactions, machince skills, security and prevention, and resources. Each section contains numerous performance objectives, coordinated with suggested teaching methods and suggested resources. (KC)

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Universal Teller Curriculum Guide

Sponsored by
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Education

Department of
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Technical Education

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

FOREWORD

The "Universal Teller Curriculum Guide" has been designed to provide the teacher with a basis for planning a comprehensive program in the career field of universal teller, and to allow the teacher and learner maximum flexibility. The guide is designed to serve persons of diverse abilities, aptitudes, interests and cultural backgrounds who want, need, and can profit from organized instruction as a universal teller.

The Illinois State Board of Education is committed to assisting local communities in the development of quality instructional programs to prepare and upgrade persons for productive careers. The curriculum guide is a vocationally oriented system designed to meet the needs of persons who have entered or are preparing to enter finance and credit careers requiring competencies as a universal teller including: mathematics, business English, machine skills, promotion of services, filing, and management. The nature of the program must take into account community characteristics and special needs of the persons to be served.

The universal teller instruction is organized under one or both of the following modes: competency based individualized or group instruction. Inherent in both modes are structured learning experiences which lead the students to identified career goals.

Special recognition is given to the following individuals for their outstanding contributions: Dr. Urban Oen, Competency Based Curriculum Consultant and Ms. Cass Streicher, DAVEA Lead Division Teacher. A sincere thank you is extended to the DAVEA Finance and Credit Advisory Committee members. This committee was instrumental in securing equipment and software, and continually advised the development of this guide to implement the program. The committee members include: Mr. Edward Benway, Downers Grove National Bank; Mr. Fred Meier, Roselle State Bank; Ms. Barbara DeJong, DuPage Bank and Trust Company; Ms. Lois Williamson, Roselle State Bank; Ms. Barbara Nelson, Downers Grove National Bank; Mr. Ken Holmstrom, Bank of Westmont; Ms. Deanna Edwards, Regency National Bank; Mr. Laurie Batts, Regency National Bank; and Mr. Thomas Johnson, Harper Junior College.

Donald G. Gill
State Superintendent
of Education

HOW TO USE THE CURRICULUM GUIDE

The Universal Teller Curriculum Guide has been designed to be used in both educational and financial institutions. Teaching or instruction can be accomplished through large formal groups, small groups, or individual instruction.

Each skill/task has been developed into a goal format with a stated objective, resources identified and an evaluation procedure to determine competence. Goals are not sequenced and learning/instruction format can be varied to meet individual or group needs.

When handout or instructor-prepared worksheets are identified as a resource, the instructor should prepare activity sheets.

Illinois State Board of Education

Department of Adult, Vocational and Technical Education
Research and Development Section

Product Abstract

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- [ ] 01 Agricultural Education
- [X] 03 Business and Office Education
- [ ] 04 Distributive Education
- [ ] 07 Health Occupations Education
- [ ] 09 Home Economics Education
- [ ] 10 Industrial Art Education
- [ ] 16 Technical Education
- [ ] 17 Trade and Industrial Education
- [ ] 22 Cooperative Education
- [ ] Career Education
- [ ] Other (Specify) _____

8 Education Level

- [ ] Pre-K Thru 6
- [ ] 7-8
- [ ] 9-10
- [X] 11-12
- [ ] Post-Secondary
- [X] Adult
- [ ] Teacher (Pre-service)
- [ ] Administrator (Pre-Service)
- [ ] Other (Specify) _____

9 Intended for Use By

- [ ] Student
- [X] Classroom Teacher
- [ ] Local Administrator
- [ ] Teacher Educator
- [ ] Guidance Staff
- [ ] State Personnel
- [X] Other (Specify) Financial Institution Training Personnel

10 Student Type

- [X] Regular
- [ ] Disadvantaged
- [ ] Handicapped
- [ ] Limited English Proficiency
- [ ] Other (Specify) _____

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16. General Description (State the general objective and suggested method of use. Summarize the content and tell how it is organized. Continue on back of this sheet or on another sheet, if necessary.):

The "Universal Teller Curriculum Guide" has been designed to provide the teacher with a basis for planning a comprehensive program in the career field of universal teller, and to allow the teacher and learner maximum flexibility. The guide is designed to serve persons of diverse abilities, aptitudes, interests and cultural backgrounds who want, need, and can profit from organized instruction as a universal teller.

The curriculum guide is a vocationally oriented system designed to meet the needs of persons who have entered or are preparing to enter finance and credit careers requiring competencies as a universal teller including: mathematics, business English, machine skills, promotion of services, filing, and management. The nature of the program must take into account community characteristics and special needs of the persons to be served.

17. Person Completing this Abstract: Marsha W. Kaczmarek

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PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Describe the position of a Universal Teller. 2. Identify career level position for personnel in the finance and credit industry. 3. Recognize the importance of the role the professional teller has in the finance and credit industry. 4. Identify the skills and personal characteristics required of a Universal Teller. 5. List the job tasks of a cashier. 6. Identify personal characteristics of a cashier.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Preparation of a job description for the position of Universal Teller. 2. Comparison of skills required of a Universal Teller and a cashier. 3. Recognition of personal characteristics and attitudes of a Universal Teller and cashier.	1. Modern Teller Training Handbook #1 2. The Cashier Series Chapter 1 3. This Is Your Bank Unit 1

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Identify the historical highlights of the banking industry. 2. Understand the different kinds of financial institutions. 3. Describe the organization and development of the Federal Reserve System.	Completion of worksheet and/or written quiz can be used to determine knowledge/ skill of the following topics: 1. Identification of the historical highlights of banking. 2. Comparison of different kinds of financial institutions. 3. Identification of organization and services of the Federal Reserve System.	1. Teller's World Chapter 2 2. Principles of Bank Operation Chapter 22 3. More Than Money Unit 5 4. Teller Operations Chapter 1 5. 4000 Years of Banking

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Write a resume'. 2. Write a letter of application/introduction. 3. Complete a standardized job application form. 4. Demonstrate job interview skills in a role-play situation.	Learner will be supplied with worksheet/check sheet to determine the following: 1. Ability to construct a presentable resume' and letter of introduction. 2. Ability to satisfactorily complete a job application. A practical test could be used to determine hands-on abilities in: 1. Demonstration of job interview skills in a role play situation.	1. Turner Career Guidance Series on: a. Wanting a Job b. Training for a Job c. Starting a Job d. Looking for a Job e. Holding a Job f. Changing a Job 2. Getting a Job (Pitman) 3. The Job Interview 4. Applying for a Job 5. How to Find and Apply for a Job Interview 6. The Job You Want - How To Get It 7. Getting a Job (South-Western)

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. File alphabetically, numerically, and/or paperwork relating to the daily activities of the finance and credit industry. 2. File correspondence and subject paperwork relating to the daily activities of the finance and credit industry. 3. Complete a hands-on project demonstrating filing ability.	A practical test could be used to determine hands-on abilities in: 1. Construct alphabetic, numeric, correspondence, geographic, and subject filing systems. 2. Demonstrate ability to complete a "hands-on" filing project for correspondence and paperwork relating to finance and credit industry.	1. Progressive Filling, test and kit - Projects of alphabetical filing 2. Business Filing and Records Control - Projects relating to numerical filing 3. Gregg Quick - Reference Filing Projects relating to alphabetic and numerical filing 4. Filing Practice Workbook 5. Checks for numerical filing, bank correspondence, interoffice bank materials, foreign drafts, etc. for geographic filing

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Identify terms and develop skill using vocabulary associated with the finance and credit industry. 2. Identify words that can be misinterpreted when working with customers.	Completion of worksheet and/or written quiz can be used to determine knowledge/ skill of the following topics: 1. Identification of terms associated with the finance and credit industry. 2. Recognition of words misinterpreted when working with customers.	1. Dictionary of Bank Terms (all) 2. Retail Credit Chapter 31 3. Financial Terminology by NCR (all) 4. Birth of a Business Cassette 9

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Type letters in mailable form using appropriate letter styles, punctuation and spelling. 2. Demonstrate mastery of accurate proofreading. 3. Demonstrate ability to correct errors.	A practical test could be used to determine hands-on abilities in: 1. Typing mailable letters and forms applicable to the business activities carried out in the finance and credit industry.	1. Typing Mailable Letters Choose any projects 1-15 2. Developing Proofreading Skills Chapters 1, 2, and 10 3. Typing in Plain English

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Express numbers in figure and word style. 2. Understand and express business words and phrases. 3. Formulate plurals and possessories. 4. Demonstrate appropriate hyphenation. 5. Correctly form a word or phrase. 6. Locate correct business English rules within reference manuals. 7. Edit letters and business forms for correct format and grammar.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Correction of expressions of figures, word style, business phrases, and words. 2. Formulation of plurals, possessories and hyphenated business records. 3. Association of appropriate business English rules with daily finance and credit terminology.	1. The Gregg Reference Manual Sabin 2. Word Studies 3. Business English Communications 4. English Usage Drills and Exercises 5. Punctuation Drills and Exercises 6. English Made Easy

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Correctly syllabicate business words. 2. Spell 100 of the most commonly misspelled business words. 3. Correctly use prefixes and suffixes. 4. Identify examples of homonyms, antonyms and synonyms. 5. Correctly use geographic names and common abbreviations.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Formulate correct syllabication of business words. 2. Identification of correct spelling of commonly misspelled business words. 3. Recognition of homonyms, antonyms, and synonyms. 4. Formulate appropriate prefixes and suffixes. 5. Recognition of geographic names and common abbreviations.	1. Word Studies 2. Business English Communications 3. English Usage Drills and Exercises 4. Punctuation Drill and Exercises 5. English Made Easy

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Demonstrate business-like telephone techniques. 2. Recognize how telephone etiquette conveys an image and attitude. 3. Identify techniques used to place and receive calls, carry out and close business transactions, and take accurate message.	A practical test could be used to determine hands-on abilities in: 1. Placing and receiving business telephone calls. 2. Taking accurate business messages. 3. Handling business transactions in a professional manner.	1. "Thank-you, please call again." 2. First Impressions 3. More Than Money

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Define customer relations. 2. Describe the essential elements of a customer relations program. 3. Analyze existing customer relations programs found in area of financial and credit institutions.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Essential elements of a customer relations program. 2. Procedures in establishing an effective customer relations program for a finance and credit institution.	1. Customer Relations Chapter 4 2. More Than Money Unit 3 3. Winning With Customers

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Evaluate the importance of co-workers. 2. Realize the necessity of a distribution of abilities among the co-workers. 3. Evaluate traits found in successful employees. 4. Develop guides for creating friendly relations with your co-workers. 5. Determine how supervisors influence the quality of customer relations. 6. Discuss the role of supervisor as a coordinator between management and and employees.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Evaluation of the importance of co-workers. 2. Supervisory influence in customer relations. 3. Importance of the supervisor as a coordinator between management and employees. 4. Case studies and/or small group discussion can be used to determine: a. Traits found in successful employees b. Guidelines for creating friendly relations with co-workers.	1. Customer Relations Chapters 5, 6, and 7 2. Improving Customer Relations 3. More Than Money Unit 1 4. Instructor prepared worksheet with case situations to develop attitude skill for positive employee relations

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Demonstrate the ability to listen attentively to a customer. 2. Demonstrate the ability to give clear instructions and explanations. 3. Demonstrate the ability to follow orders/instructions accurately. 4. Identify reasons why customers appreciate/expect confidentiality when dealing with a teller. 5. Describe techniques in handling transactions which assure customer confindentiality and still maintain good customer relations. 6. Identify employee role in promoting effective customer relations. 7. Analyze the manner in which a teller reflects the institution to the customer.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Importance of customer confidentiality. 2. Ability to give clear instructions and explanations. 3. Ability to follow orders/instructions accurately. 4. Recognition of the teller's role in customer relations.	1. Modern Teller Training Workbook and Cassette 1 & 12 2. Winning With Customers 3. Customer Relations Chapter 5 4. Improving Customer Relations 5. More Than Money Unit 3 6. Instructor prepared worksheet with case situations to practice skill in following directions could be coordinated with an in-house made cassette tape to practice verbal directions as well as written directions.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Read, write, compare and express decimals to a given number of places. 2. Add with/without decimals. 3. Subtract with/without decimals. 4. Multiply with/without decimals. 5. Divide with/without decimals.	Completion of worksheet and/or written quiz can be used to determine knowledge/ skill of the following topics: 1. Ability to perform the four basic arithmetic operations with/without decimals.	1. Mathematics Skill Builder 2. Applied Business Mathematics 3. Vocational Mathematics Chapter 1

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Arrange coins and currency in a cash tray for a day's transaction. 2. Inspect and process mutilated and badly worn coins and currency. 3. Count and package coins and currency using the denominations units and ones system for counting. 4. Handle coins and currency received from and paid to customers in the course of processing transactions. 5. Transfer money as part of the daily activity. 6. Identify precautionary measures used to minimize errors, swindles, and thefts.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Contents in a teller drawer. 2. Counting sequences and systems. 3. Procedures in handling denominations of currency. 4. Preparation of a debit and credit memo. 5. Preparation of a teller transfer ticket. A practical test could be used to determine hands-on abilities in: 1. Counting currency. 2. Setting up teller drawer. 3. Handling large denominations of money. 4. Preparation of a debit memo, credit memo, and a transfer ticket.	1. Teller's World Chapter 7 2. Modern Teller Training Wookbook and Cassette 2 3. The Cashier Series Chapter 2 4. Teller Operations Chapter 2 5. The Cash Box (Game simulation)

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Prepare a daily proof sheet. 2. Balance out a cash blotter. 3. Recognize and correct errors and their source when balancing a blotter.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Preparation of proof sheet. 2. Identification of errors in balancing out. 3. Correction of detected errors in balancing out. A practical test could be used to determine hands-on abilities in: 1. Preparation of a proof sheet. 2. Balancing a cash blotter, determining and correcting any errors previously made.	1. Teller's World Chapter 10 2. Modern Teller Training Cassette and Workbook 3 3. The Cash Box (Gam simulation)

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Identify the parts of a check which must be met to be considered a negotiable instrument. 2. Recognize the importance and use of the signature card. 3. Identify the different types of checks in daily circulation. 4. Identify the different types of acceptable endorsements.	Completion of worksheet and/or written quiz can be used to determine knowledge/ skill of the following topics: 1. Identification of the parts of a check. 2. Identification of the types of checks. 3. Identification of the types of acceptable endorsements.	1. Modern Teller Training Workbook 2 2. Financial Skills "Check Paying" Part I 3. Teller's World Chapter 6 and 9 4. Bank Security Today Module I 5. The Cashier Series Chapter 4

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Handle the issuance of certified checks, cashier's checks and money orders. 2. Handle the issuance of traveler's checks and provide customer information on proper use of traveler's checks. 3. Handle the issuance of bank drafts and foreign drafts. 4. Handle the issuance of certificate of deposit and Series E savings bonds. 5. Handle credit card advances. 6. Process/Redeem coupons on U.S. savings bonds. 7. Accept Christmas Club payments. 8. Accept installment loan and bank credit card payments. 9. Admit customers to safe deposit boxes.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Procedures used in issuing: a. Traveler's Checks b. Certified Checks c. Money Orders d. Bank Drafts e. Foreign Drafts f. Credit Card Advances 2. Information about the identified negotiable instruments to aid customers in their proper usage. A practical simulation exercise or test could be used to determine hands-on abilities in: 1. Handling the issuance of certificate of deposit and Series E savings bonds. 2. Processing/Redemption of coupons on U.S. savings bonds. 3. Accepting Christmas Club payments, installment loan, and credit card payments. 4. Procedures for admitting customers to safe deposit boxes.	1. Modern Teller Training Workbook and Cassette 6 and 7 2. Teller Operations Chapters 3 and 12

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Prepare deposit slips for customers. 2. Process cash and check deposits. 3. Enter interest into a customer's account. 4. Identify the types of checking deposits and the procedures for handling each type of deposit. 5. Process deposits that originate from sources other than the teller's window. 6. Identify the types of savings deposits and the procedures for handling each type of deposit. 7. Process a savings withdrawal	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Identification of the types of checking and savings deposits. 2. Preparation of deposit slips. 3. Procedures in entering interest into customer's account. 4. Procedures in handling deposits and withdrawals. A practical test could be used to determine hands-on abilities in: 1. Operational abilities on the teller machine to perform checking and savings deposits and withdrawals and interest adding functions.	1. Modern Teller Training Wookbook and Cassette 4 and 5 2. Instructor - Created simulation utilizing deposit slip samples 3. Operators Manual for teller machines being used for training

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Define debits and credits. 2. Identify debit and credit items used for each type of transaction.	Completion of worksheet and/or written quiz can be used to determine knowledge/ skill of the following topics: 1. Identification of debit and credit items in given transactions.	1. Modern Teller Training Workbook and Cassette 8 2. Instructor - Prepared simulation with worksheet exercises 3. Principles of Banking Operations Chapter 5

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Cash a single check. 2. Cash two or more checks. 3. Cash checks with a fee. 4. Prepare corresponding cash-in and cash-out tickets for each transaction.	Learner will be supplied with worksheet/ check sheet and a teller machine to demonstrate the following: 1. Cashing a single check. 2. Cashing two or more checks. 3. Cashing checks with a fee added. 4. Preparing cash-in and cash-out tickets.	1. Operators Manual for a teller machine to be utilized 2. A teller machine 3. Instructor prepared worksheet identifying simulated exercises for each transaction required including necessary forms for cash-in and cash-out tickets.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Deposit checks issuing a single receipt. 2. Deposit checks issuing duplicate receipts. 3. Deposit cash only into an account. 4. Deposit cash/checks into an account. 5. Prepare corresponding cash-in and cash-out tickets.	Learner will be supplied with worksheet/ check sheet and a teller machine to demonstrate the following: 1. Depositing checks into the customers account preparing cash-in tickets. 2. Depositing cash into the customers account. 3. Handling the proper amount of money to be returned. 4. Preparing cash-in and cash-out tickets for each transaction.	1. An Operators Manual for a teller machine 2. A teller machine 3. Instructor prepared worksheet identifying simulated exercises for each transaction required including necessary forms for cash-in and cash-out tickets.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Process savings withdrawals, single and multiple, from a customer's account. 2. Enter amount of interest in savings account. 3. Prepare corresponding cash-out tickets.	Learner will be supplied with worksheet/ check sheet and a teller machine to demonstrate the following: 1. Processing savings withdrawals from a customer's account. 2. Entering interest to customer account. 3. Preparing cash-in and cash-out tickets for each transaction.	1. Operators Manual for a teller machine 2. A teller machine 3. Instructor prepared worksheet identifying simulated exercises for each transaction required including necessary forms for cash-in and cash-out tickets.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Locate function keys. 2. Identify purpose of each function key. 3. Describe the difference between terminal function and application function. 4. Locate and operate keys and locks. 5. Identify and operate mode keys. 6. List and explain the function and eight data descriptor messages on the numeric display panel. 7. Explain the relationship of the clear key to entry errors. 8. Discuss the modes of operation of the teller machine. 9. Perform the "Start of the day" procedure on the teller machine.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Operation of the teller machine keyboard in regard to function and mode keys. 2. Identification and operation of keys and locks on teller machine. 3. Identification/explanation of the eight data descriptor messages and their functions. 4. Identification of entry errors. 5. Identification of modes of operation. A practical test could be used to determine hands-on abilities in: 1. "Start of the day" procedures.	1. Operators Manual for the teller machine 2. A teller machine 3. Instructor prepared worksheet to serve as a guide in identification quiz of keyboard, functions and modes of operation, and exercises to simulate start of the day procedures.

MACHINE SKILLS

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Inscribe the spelled amount (value) of a check in the appropriate location on a check using a checkwriter. 2. Inscribe the numerical amount (value) of a check in the appropriate location on a check using a checkwriter.	A practical test could be used to determine hands-on abilities in: 1. Ability to inscribe spelled amounts and numeric amounts on a check using a checkwriter.	1. Operators Manual for a checkwriter 2. A checkwriter 3. Instructor prepared worksheet with practice exercises to develop the skill of using a checkwriter.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Process credits through a teller machine to handle customer payments.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Processing a credit through a teller machine as a savings withdrawal. 2. Processing a credit through a teller machine with a check/cash as payment.	1. Operators Manual for a teller machine 2. A teller machine 3. Instructor prepared worksheet with practice exercises to develop the skill of using a teller machine for customer credit transactions.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Obtain teller batch totals. 2. Balance blotter against daily totals.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Balancing cash blotter after daily transactions. 2. Operation of teller machine to obtain teller batch totals.	1. Operators Manual for a teller machine 2. A teller machine 3. Instructor prepared worksheet with practice exercises to develop the skills of taking batch totals and balance the blotter against the totals.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Open new customer checking and savings accounts. 2. Make title changes on customer accounts. 3. Assist customers in ordering/selecting checking account styles and materials. 4. Instruct customers in procedures of how to use a checking account. 5. Assist customers in balancing checkbooks. 6. Inform customers of the types of savings accounts/plans available and the benefits of each.	A practical /simulation test could be used to determine hands-on abilities in: 1. Procedures for opening personal and business checking accounts. 2. Procedures for opening savings accounts. 3. Use of forms relating to opening all types of checking and savings accounts: a. Temporary signature cards b. Signature cards c. Resolutions d. Temporary checks e. Deposit slips f. Check register g. Deposit order forms 4. Sales-ability in respect to introducing/informing customers of available services and accounts in an effort to produce new business.	1. Opening New Accounts 2. This Is Your Bank Unit 2 3. Complete set of forms used at a bank to open all types of checking and savings accounts. 4. Bank literature on savings plans and their benefits available. 5. Bank literature pertaining to available bank services for customers.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Complete addition, subtraction, multiplication, division, and percentages on the calculator.	A practical test could be used to determine hands-on abilities in: 1. Addition, subtraction, multiplication, division, and percentages on the calculator.	1. How to Use Adding and Calculating Machines

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Define "Bait Money". 2. Identify the reasons why and when "bait money" is used. 3. Identify internal bank security safeguards. 4. Define embezzlement. 5. Identify various ways swindlers try to obtain money illegally from financial institutions. 6. List and describe the different types of forgeries and how to detect each type. 7. Recognize how forgers operate and how to guard against these security threats. 8. Define "counterfeit money". 9. Identify/List the parts on currency that should be observed to protect against the passage of counterfeit money.	Completion of worksheet and/or written quiz can be used to determine knowledge/ skill of the following topics: 1. Bait money 2. Embezzlement 3. Forgeries 4. Swindlers 5. Counterfeit money 6. Internal security safeguards	1. Bank Security Today Module 2 and 4 Workshop and Workbook 1 2. Modern Teller Training Workbook and Cassette 11 3. More Than Money Unit 4 4. The Cashier Series Chapter 2 5. Teller Operations Chapter 2 6. Instructor prepared worksheet 7. Detecting Color Copier Counterfiets

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Examine counter receipts for acceptability. 2. Examine deposit slips for acceptability. 3. Examine credentials used for identification to determine acceptability.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Procedures used to determine acceptability of counter receipts, deposit slips and customer identification.	1. The Cashier Series Chapter 6 2. Bank Security Today Module 2 3. Financial Skills "Signature Verification" Part II 4. More Than Money Unit 4 5. This Is Your Bank Unit 3

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Identify safety and fire prevention procedures which should be adminstered. 2. Outline procedures for handling a "panic" crisis during an accident or fire. 3. Describe and demonstrate basic first-aid techniques that may be necessary in handling medical emergencies.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Procedures for safety and fire prevention to prevent or decrease a "panic" situation. A practical test could be used to determine hands-on abilities in: 1. Demonstration of basic first-aid techniques that may be necessary.	1. Bank Security Today Workshop 2 2. Local officials from fire and police departments 3. School nurse 4. Instructor prepared worksheet identifying safety tips, simulation cases, floor plans, etc.

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Identify the procedures to be used in case a kidnap or extortion threat is made by phone. 2. List steps to be followed to avoid being kidnapped.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Procedures to be used in a kidnap and /or extortion situation. 2. Procedures to be followed to avoid kidnapping.	1. Modern Teller Training Workbook and Cassette 11 2. Bank Security Today Workshop I 3. More Than Money Unit 4

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Handle money in a manner that will discourage robberies and swindles. 2. Demonstrate methods of cash drawer security. 3. Identify procedures to be used during and after a robbery/hold-up situation.	Completion of worksheet and/or written quiz can be used to determine knowledge/skill of the following topics: 1. Procedures to be used in handling money to discourage robberies and swindles. 2. Procedures to be used during and and after a hold-up situation. A practical simulation can be created to determine cash drawer security procedures.	1. NCR's Money Safeguards Booklet 2. Handling Money Filmstrip 3. Modern Teller Training Workbook and Cassette 11 4. Bank Security Today Workshop 2 5. More Than Money Unit 4 6. This Is Your Bank Unit 4

PERFORMANCE OBJECTIVES	SUGGESTED METHODS	SUGGESTED RESOURCES
1. Operate the microfiche reader. 2. Locate and supply information through the use of the microfiche reader.	Learner will be supplied with worksheet/ check sheet to determine the following: 1. Ability to accurately locate information on a microfiche.	1. Business Filing and Records Control 2. Filing Systems and Records Management 3. Records Management * Instructor needs to secure several samples of microfiche and a microfiche reader.

AVAILABLE RESOURCE LISTING ADDRESSES

American Institute of Banking
American Banker's Association
1120 Conneticut Ave. N.W.
Washington, D.C. 20036

Arco Publishing Co. Inc.
219 Park Ave. South
New York, New York 10003

Bank Administration Institute (BAI)
303 Northwest Highway
Park Ridge, Illinois 60068

Bankforms Inc.
2349 North 17th Ave.
Franklin Park, Illinois 60131

Creative Teaching Associates
P.O. Box 7766
Fresno, California 93747

Educational Systems Inc.
Continental Illinois National
Bank and Trust Co. of Chicago
231 South LaSalle Street
Chicago, Illinois 60693

Fearon-Pitman Publishing Inc.
Six Davis Drive
Belmont, California 94002

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Federal Reserve Bank
Contact the office of the Federal
Reserve in your district.

First National City Bank
Educational Activities Inc.
180 W. Merrick Ave.
Freeport, New York 11520

G.P. Putnam & Sons Publishing Co.
200 Madison Ave.
New York, New York 10016

Gregg-McGraw Hill Publishing Co.
Contact the office in your
service region

Institue of Financial Education
111 East Wacker Drive
Chicago, Illinois 60601

Instructional Materials Center
Main Building 2400
The University of Texas at Austin
Austin, Texas 78710

International Society
for General Sematics
P.O. Box 2469
San Francisco, California 94126

John Wiley & Sons
101 Wiley Drive
Summerset, New Jersey 08873

Monroe Calculator Company
623 South Walbash
Chicago, Illinois 60605

National Cash Register Corp. (NCR)
Contact your local sales/
service office or NCR
1700 S. Patterson Blvd.
Dayton, Ohio 45409

Ohio Distributive Education
Materials Lab
Ohio State University
123 Townshend Hall
1885 Neil Ave.
Columbus, Ohio 43210

Southwestern Publishing Co.
Contact your local service
region office

TRW Financial Systems
Technical Publications
3603 Silver Star Road
Orlando, Florida 32808

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Western Tape
2761 Marine Way
Mountain View, California 94040

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
An American Account "The Story of Banking"	Federal Reserve Bank Southwestern Publishing Co.	Filmstrip
Applied Business Mathematics	Fairbanks and Schultheis Southwestern Publishing Co.	Textbook w/supplementary workbook w/student exercises and practice tests
Applying For a Job	Leo Chiantelli Western Tape 1978	Cassette tape w/corresponding workbooks
Banking Technology	Gary Kuebbler Ohio Distributive Educ. Materials Lab Ohio State University, Columbus Ohio	Textbook
Basics of Banking	National Cash Register (NCR)	Pamphlet
Basic Retail Credit	JoAnne Reeves, author Instructional Materials Center University of Texas	Testbook with chapter questions, no student workbook
Business English Communications	Himstreet, Pauter, and Maxwell Fearon-Putman Publishing Company	Textbook
Business Filing and Records Control	Bassett and Goodman Southwestern Publishing Co.	Textbook w/student questions and projects
Cashing Checks	National Cash Register (NCR)	Pamphlet
Communications in Marketing	Ken Rowe Gregg Division McGraw-Hill Book Co.	Textbook with chapter activities accompanying audio exercise (record)
Credit and Collections	Donald Kohns Southwestern Publishing Co.	Textbook with student projects to accompany reading

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
Credit and Collections	National Cash Register (NCR)	Pamphlet
Cross-Selling Program (Savings Association Business)	The Institute of Financial Education Chicago, Illinois	Audio-visual program with slide/cassette tape package and guidesheets
Customer Relations	Lawrence Conway American Savings and Loan Institute Press	Textbook with chapter questions
Customer Services	Leroy M. Buckner Gregg Division McGraw-Hill Book Company	Textbook with chapter activities and accompanying audio (record) exercise
Detecting Counterfeits by Color Copier	Bank Adminstration Institute (BAI)	Audio/visual slide presentation with individual handouts
Developing Proofreading Skill	Sue C. Camp Gregg Division Mc Graw-Hill Publishing Co.	Project workbook with student exercises
English Made Easy	Bernadine P. Branchau McGraw-Hill Publishing Co.	Workbook with drill exercises
English Usage Drills and Exercises	Leroy A. Brendel and Elsie Leffingwell Mc Graw-Hill Publishing Co.	Text/workbook with exercises Programmed for typewriter use
Filing Practice Workbook	Donald W. Connor Fearon-Putman Publishing Company	Workbook with student drill exercises
English the Easy Way	Schachter and Clark Southwestern Publishing Co.	Project workbook with student activities
Finance and Credit	Ohio Distributive Educ. Materials Lab Ohio State University, Columbus, Ohio	Practice Set

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
Financial Skills	Educational Systems, Inc. Continental Ill. National Bank & Trust Company of Chicago	Audio/visual package with workbooks and cassette tapes
Financial Terminology	National Cash Register (NCR)	Pamphlet
4000 Years of Banking	National Cash Register (NCR)	Pamphlet
Getting a Job	Florence Randall Fearon-Putman Publishing Co.	Project workbook with student exercises
Getting a Job	Zedlitz Southwestern Publishing Co.	Package kit containing work-sheets for simulations
Getting Into Business	E. N. Chapman John Wiley and Sons, Inc.	Textbook with chapter self tests
Glossary of Savings Association Terms	The Institute of Financial Education Chicago, Illinois	Handbook
Gregg Reference Manual	William Sabin Gregg Division McGraw-Hill Book Company	Textbook with accompanying student worksheets and quizzes
Handbook of Savings and Loans	The Institute of Financial Education Chicago, Illinois	Handbook
Here is Your Career: Banking, Money and Finance	April Klimley G. P. Putnam and Sons Publishing Co. New York, New York	Textbook
How To Find and Apply For a Job	Kushner and Keily Southwestern Publishing Co. (3rd Edition)	Reference manual identify forms and procedures

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
Human Relations at Work	Stenen Eggland and John Williams Southwestern Publishing Co.	Project workbook with student activities
Mathematics Skill Builder	Gossage and Briggs Southwestern Publishing Co.	Textbook with student exercises
Modern Teller Training	Bank Administration Institute (BAI)	Self-instructional program audio/visual package of cassettes and workbooks
Money On the Move - The Federal Reserve Today	Federal Reserve Bank	Filmstrip
More Than Money	Bank Administration Institute (BAI)	Self-instructional program audio/visual package of cassettes and workbooks
NCR 279 Operator's Manual	National Cash Register (NCR)	Operator's instructional manual; no student practice exercises
Orientation Program (Savings Association Business)	The Institute of Financial Education Chicago, Illinois	Slide-tape cassette package with support worksheets and guides
Organizing Jobs in Banking	Marshall Corns Bank Publishing Company Boston, Massachusetts	Textbook
Opening New Accounts	Bank Administration Institute (BAI)	Self-instructional program audio/visual package of cassettes and workbooks
Paying By Check	Federal Reserve Bank	Filmstrip

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
Principles of Bank Operations	American Institute of Banking American Banker's Association	Textbook with chapter questions
Principles of Teller Work	Bank Administration Institute (BAI)	Pamphlet
Progressive Filing (Kit)	McGraw-Hill Publishing Company	Project Kit with text and activities
Psychology and Human Relations	Donal Hiserodt Gregg Division McGraw-Hill Book Company	Textbook with chapter activities
Public Relations Handbook for Savings Association	The Institute of Financial Education Chicago, Illinois	Textbook
Punctuation Drills and Exercises	Leroy A. Brendel and Doris Near McGraw-Hill Publishing Company	Textbook/workbook with student drills for typewriter use
Safeguards in Handling Money	National Cash Register (NCR)	Pamphlet
Teller Operations	The Institute of Financial Education Chicago, Illinois	Handbook
Teller Training Program	The Institute of Financial Education Chicago, Illinois	Audio/visual program with self-instructional workbooks, cassette tapes and slides and work simulation exercises
Teller World	Paul Jannott Banker's Education Company	Textbook
Ten Key		

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
The Bank Account	Arthur Wiebe Creative Teaching Associates Fresno, California	Game-simulation of using checking and savings accounts
The Cash Box	Fearon-Putman Publishing Company	Coin/Currency practice kit
The Cashier (Series)	Chase Manhattan Bank Gregg Division McGraw-Hill Book Company	Textbook with chapter questions and activities. Accompanying filmstrips and cassettes for each unit
The FED: Our Central Bank	Federal Reserve Bank	Filmstrip
The Look Is Natural	First National City Bank Freeport, New York Educational Activities, Inc.	Filmstrip
The Man in The Mirror	The Institute of Financial Education Chicago, Illinois	Handbook
The Role of The Commerical Banking System	Federal Reserve Bank	Filmstrip
This is Your Bank	Bank Administration Institute (BAI)	Policy and procedures manual, system to be adapted to individual needs
Troubled Talk	Alfred Fleishman International Society for General Sematics San Francisco, California	Handbook
Truth in Lending Regulations Z (Creditor)	Federal Reserve Bank	Filmstrip

TITLE OF RESOURCE	AUTHOR/PUBLISHER OF RESOURCE	TYPE OF RESOURCE
Today's Basic Business Mathematics through Electronics	Monroe Calculator Company	Student exercise handbook
TRW Model 151 Teller Terminal Operator's Manual	TRW Corporation	Operator's Instructional Manual; no student practice exercises
Typing In Plain English	Ann D'Onafrio Hamill & Gerald F. Baber Fearon-Putman Publishing Company	Programmed student workbook complete with student exercises with supplemental drills and word games
Typing Mailable Letters	Liles, Brendel, Krause McGraw-Hill Book Company	Project workbook with student activities
Vocational Math for Business	Marie Martinka Southwestern Publishing Company	Textbook of student exercises
Winning With Customers	Continental Illinois National Bank and Trust Company of Chicago Educational Services Division	Audio/visual program with slides, cassette tapes and worksheet activities
Word Studies	Southwestern Publishing Company	Textbook with accompanying student worksheets and quizzes
Working Together	Bank Administration Institute (BAI)	Pamphlet
Your Future in Banking	Ralph Boyton Arco Publishing Company	Textbook
Bank Forms Inc.		Professionally reproduced bank forms

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